

**STATE OF MARYLAND  
DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT**



**Invitation for Bids (IFB) No. DHCD-16-3  
SINGLE FAMILY APPRAISAL SERVICES**

**IFB Date:** March 31, 2016

**Procurement Officer:** Jada Fletcher  
7800 Harkins Road, Room 260, Lanham, Maryland 20706  
Phone: (301) 429-7570  
E-mail: [jada.fletcher1@maryland.gov](mailto:jada.fletcher1@maryland.gov)

**Contract Monitor:** David Klingler  
7800 Harkins Road, Lanham, Maryland 20706  
Phone: (301) 429-7799  
E-mail: [david.klingler@maryland.gov](mailto:david.klingler@maryland.gov)

**Bids are to be sent to:** Department of Housing and Community Development  
7800 Harkins Road, Room 260, Lanham, Maryland 20706  
Attention: Jada Fletcher

***Mark in the lower left or right-hand corner: "IFB No. DHCD-16-3; MUST BE OPENED BY ADDRESSEE ONLY."***

***Bids must be sealed and clearly labeled exactly as indicated to ensure that they are delivered intact and unopened.***

**Bid Due (Closing) Date and Time:** April 7, 2016, at 2:00 P.M, Local Time

**NOTICE**

Prospective Bidders who have received this document from a source other than the Issuing Office should immediately contact the Issuing Office and provide their name and mailing address so that any amendments to the IFB and other communications may be sent to them.

**Minority Business Enterprises and Certified Small Businesses  
are encouraged to respond to this solicitation.**

## **General Information**

### **Summary**

The Department of Housing and Community Development (DHCD), a principal department of the State of Maryland (State), is seeking qualified Contractors to provide appraisal services for single family homes or one-to-four-unit rental properties located throughout Maryland in three regions: Eastern Shore, Central Maryland, and Western Maryland. These services are being procured on behalf of DHCD's Community Development Administration, Single Family Housing Programs.

### **Contract Type**

The Contract resulting from this solicitation shall be an indefinite quantity contract with firm fixed unit prices as defined in COMAR 21.06.03.06.A(2) (indefinite quantity) and 21.06.03.02.A(1) and (2) (fixed price and firm fixed price).

### **Contract Duration**

The duration of the Contract shall be from the date of issuance of the purchase order plus one year thereafter. There are no renewal options.

### **Procurement Officer**

The Procurement Officer is the primary point of contact in the State for purposes of this IFB prior to the award of any Contract. The name and contact information of the Procurement Officer are indicated in the title page.

The Department may change the Procurement Officer at any time by written notice.

### **Contract Monitor**

The Contract Monitor is the State representative for this Contract who is primarily responsible for Contract administration functions after Contract award. The name and contact information of the Contract Monitor are indicated on the title page.

The Department may change the Contract Monitor at any time by written notice.

### **Questions**

Inquiries regarding this IFB should be directed to the Procurement Officer listed on the title page.

### **Procurement Method**

This Contract will be awarded in accordance with COMAR 21.05.07, which governs procurement of \$25,000 or less.

### **Bid Closing Date and Time**

All bids must be received at the address and no later than the Bid Due date and time indicated on the title

page. **No late bids will be accepted.**

#### **Duration of Bid**

Bids submitted in response to this IFB are irrevocable for sixty (60) days following the closing date for bids. The Procurement Officer may extend this period, with the Bidder's written consent.

#### **Multiple or Alternate Bids**

Multiple and/or alternate Bids will not be accepted.

#### **Award Basis**

The Contract shall be awarded to the responsible Bidder submitting a responsive Bid with ***the most favorable bid price*** (per COMAR 21.05.07.06.D(2)). No more than one (1) award shall be made for each of the three regions listed on the Price Bid Form; a Bidder shall not Bid more than one region. DHCD may make ***up to three (3) awards*** under this IFB, as meets the best interest of the State.

In the event that a Bidder does bid more than one region, only the Bid for the region in the Bidder has its primary office shall be considered.

#### **Substitution of Personnel**

Any substitution of personnel after the Contract has begun must be approved in writing by the Contract Monitor prior to the substitution. If the Contractor substitutes personnel without the prior written approval of the Contract Monitor, the Contract may be terminated.

#### **Minority Business Enterprises (MBEs)**

Minority Business Enterprises (MBEs) are encouraged to respond to this solicitation. MBE vendors are encouraged to obtain MBE certification from the Maryland Department of Transportation, Office of Minority Business Enterprise. Direct all certification-related questions to:

Office of Minority Business Enterprise  
Maryland Department of Transportation  
P.O. Box 8755  
BWI Airport, Maryland 21240-0755  
(410) 859-7328  
<http://www.mdot.maryland.gov>

#### **Small Businesses**

Although this is not a Small Business Reserve procurement, small businesses are encouraged to respond to this solicitation and to register with the Maryland Department of General Services for the Maryland Small Business Reserve Program through a self-certification process at <https://www.smallbusinessreserve.maryland.gov/registration/>.

A "Small Business" is a business, other than a broker, that meets the following criteria:

- The business is independently owned and operated;
- The business is not a subsidiary of another business;

- The business is not dominant in its field of operation;
- The wholesale operations of the business did not employ more than 50 persons, and the gross sales of the business did not exceed an average of \$4,000,000 in its most recently completed 3 fiscal years;
- The retail operations of the business did not employ more than 25 persons, and the gross sales of the business did not exceed an average of \$3,000,000 in its most recently completed 3 fiscal years;
- The manufacturing operations of the business did not employ more than 100 persons, and the gross sales of the business did not exceed an average of \$2,000,000 in its most recently completed 3 fiscal years;
- The service operations of the business did not employ more than 100 persons, and the gross sales of the business did not exceed an average of \$10,000,000 in its most recently completed 3 fiscal years;
- The construction operations of the business did not employ more than 50 persons, and the gross sales of the business did not exceed an average of \$7,000,000 in its most recently completed 3 fiscal years; and
- The architectural and engineering operations of the business did not employ more than 100 persons, and the gross sales of the business did not exceed an average of \$4,500,000 in its most recently completed 3 fiscal years.

If a business has not existed for three years, the gross sales average is computed for the period of the business's existence. For newly formed businesses the determination will be based upon employment levels and projected gross sales.

### **Verification of Registration and Tax Payment**

Before a business entity can do business in the State it must be registered with the State Department of Assessments and Taxation (SDAT). SDAT is located at State Office Building, Room 803, 301 West Preston Street, Baltimore, Maryland 21201. The SDAT website is <http://sdatcert3.resiusa.org/ucc-charter/>. It is strongly recommended that any potential Bidder complete registration prior to the due date for receipt of Bids. A Bidder's failure to complete registration with SDAT may disqualify an otherwise successful Bidder from final consideration and recommendation for Contract award.

### **Mandatory Contractual Terms**

By submitting a Bid in response to this IFB, a Bidder, if selected for award, shall be deemed to have accepted all terms and conditions of this IFB *and* the State's mandatory terms and conditions under COMAR 21.07.01: [http://www.dsd.state.md.us/COMAR/SubtitleSearch.aspx?search=21.07.01.\\*](http://www.dsd.state.md.us/COMAR/SubtitleSearch.aspx?search=21.07.01.*). Any exceptions to this IFB must be raised prior to Bid submission. Changes to the solicitation, including the Bid Form, made by the Bidder may result in Bid rejection.

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## MINIMUM QUALIFICATIONS

The following qualifications must be met to be considered for contract award:

- A. Experience. The Bidder shall have at least three (3) years of experience in Maryland residential appraisal services, including preparation of written appraisal reports. Proof of required experience shall be provided in writing with the following information:
1. Name of entity(ies) for which appraisals were performed
  2. Name, complete address, email, and phone number of contact person
  3. Type of appraisal conducted
  4. Dates of service
- B. Licensure and Certification. All appraisers comprising the engagement team shall hold and continue to hold for the term of the contract the following licenses:
1. ***At least one (1)*** of the following licenses from the Maryland Commission of Real Estate Appraisers, Appraisal Management Companies, and Home Inspectors (“the Commission”):
    - a) Licensed Real Estate Appraiser
    - b) Certified Residential Real Estate Appraiser
  2. Have an active listing on the Single Family Appraiser Roster of the U.S. Department of Housing and Urban Development’s Federal Housing Administration (FHA). Eligibility requirements are given here:  
[http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/housing/sfh/appr/eligibility](http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/sfh/appr/eligibility).
  3. Proof of numbers one and two shall be provided in writing with the following information:
    - a) Appraiser’s full name
    - b) License number and expiration date
- C. Location of Contractor. The Contractor shall have its primary office located in the same region as that being bid. The Procurement Officer shall verify this through the State Department of Assessments and Taxation.

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## **SCOPE OF WORK**

### **Background**

The purpose of this IFB is to invite qualified firms to provide property appraisal services for single family homes and one-unit to four-unit rental properties located throughout Maryland.

DHCD provides financing to individuals, incorporated firms, non-profit organizations, limited partnerships, general partnerships and limited liability corporations. In the course of its business, DHCD may require that a property appraisal be completed for a loan it is processing that involves a single family home, or one- to four-unit rental property. In the last two (2) calendar years, DHCD ordered 89 appraisals that were distributed as follows:

Baltimore County	18 each
Prince George's County	17 each
Anne Arundel County	11 each
Baltimore City	7 each
Somerset County	6 each
Kent County	5 each
Carroll, Cecil, Harford, Montgomery and St. Mary's counties	3 each
Allegany, Dorchester and Talbot counties	2 each
Charles, Washington, Wicomico and Worcester counties	1 each

Due to an expected increase in the number of appraisals required during the next fiscal year, the Bid Form reflects an estimate of 60 appraisals per year. This estimate is for bidding purposes only, and is not a guarantee or minimum; DHCD will pay only for appraisals specifically ordered and satisfactorily completed.

### **Detailed Specifications**

The Contractor shall:

- A. Prepare appraisals using the most recent Uniform Residential Appraisal Report (currently: Fannie Mae Form 1004, March 2005).
- B. Include the following items with the Uniform Residential Appraisal Report
  1. A supplemental addendum;
  2. Photos of the subject property's front, rear, and street scene;
  3. Photos of comparable properties;
  4. A floor plan;
  5. A map showing the location of the subject and all comparables;

6. A flood map, if the subject property lies within a 100-year flood zone; and
  7. A statement of limiting conditions.
- C. Provide both a current fair market value that the property would bring in a normal sale and a forced sale value that the property would bring in a distressed sale situation.
  - D. Submit appraisals to DHCD within fifteen (15) business days of assignment as directed by the DHCD Contract Manager at the time of assignment.
  - E. Submit to the DHCD Contract Manager:
    1. A monthly invoice itemizing each appraisal provided to the DHCD during the invoice month; and
    2. A quarterly report identifying the cumulative number of appraisals provided to DHCD during the contract year.

#### **Engagement Team**

The Contractor shall:

- A. Assemble a project team of appraisers with the necessary qualifications to perform the services required under the Contract.
- B. Ensure there is a sufficient number of licensed appraisers to meet DHCD's requirements within the specified timeframes

#### **Errors and Omissions Insurance**

The Contractor shall have in effect and maintain throughout the term of the Contract, Errors and Omissions insurance coverage of not less than \$300,000 per incident.

## **BID FORMAT**

**Required Bid Submissions.** Submit two (2) copies of each of the following documents with original signatures ***in a sealed envelope*** to the Procurement Officer by the bid due date and time and to the address listed on the title page.

- A. Transmittal Letter. A Transmittal Letter shall accompany the Bid and include the following:
  - 1. Name and address of the Bidder;
  - 2. Name, title, e-mail address, and telephone number of primary contact for the Bidder;
  - 3. Solicitation Title and Solicitation Number that the Bid is in response to;
  - 4. Signature, typed name, and title of an individual authorized to commit the Bidder to its Bid;
  - 5. Federal Employer Identification Number (FEIN) of the Bidder, or if a single individual, that individual's Social Security Number (SSN);
  - 6. Bidder's eMM number;
  - 7. Bidder's MBE certification number (if applicable); and
  - 8. Acceptance of all State IFB and Contract terms and conditions.
- B. Required documentation of Minimum Qualifications
- C. Completed Bid Form (**Attachment A**)
- D. Valid Certificate of Insurance, naming the State of Maryland as "Additional Insured"

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**PRICE BID FORM, page 1 of 2**

The Price Bid Form is used to calculate the Bidder's TOTAL, EVALUATED BID PRICE. Follow these instructions carefully when completing your Price Bid Form:

- A. All Unit and Extended Prices must be clearly entered in dollars and cents, e.g., \$24.15, and must be the actual price per unit for the specific item or service identified in this IFB. Every blank below shall be filled in.
- B. All calculations shall be rounded to the nearest cent, i.e., .344 shall be .34 and .345 shall be .35.
- C. Except as instructed on the Price Bid Form, nothing shall be entered on or attached to the Price Bid Form that alters or proposes conditions or contingencies on the prices. Alterations and/or conditions may render this Bidder's submission nonresponsive.

<b><u>COLUMN A</u></b> <b><u>PRICE per Appraisal</u></b> <b>(Region 1: Eastern Shore Counties)</b>	<b><u>COLUMN B</u></b> <b><u>PRICE per Appraisal</u></b> <b>(Region 2: Central MD Counties)</b>	<b><u>COLUMN C</u></b> <b><u>PRICE per Appraisal</u></b> <b>(Region 3: Western MD Counties)</b>
I. Number of Appraisals Per CY: <u>12</u>	I. Number of Appraisals Per CY: <u>40</u>	I. Number of Appraisals Per CY: <u>8</u>
II. Price per Appraisal: \$ _____	II. Price per Appraisal: \$ _____	II. Price per Appraisal: \$ _____
III. Total Yearly Price for All Counties Listed Above (Row I times Row II)  \$ _____	III. Total Yearly Price for All Counties Listed Above (Row I times Row II)  \$ _____	III. Total Yearly Price for All Counties Listed Above (Row I times by Row II)  \$ _____
TOTAL, EVALUATED BID PRICE: (Row III, Column B <i>or</i> Column C <i>or</i> COLUMN D		\$ _____

*The number of appraisals per calendar year above are estimates only for the purpose of comparing bids and are **not** a guarantee of work assigned.*

- Column A – Region 1: Eastern Shore Counties – Caroline, Cecil, Dorchester, Kent, Queen Anne, Somerset, Talbot, Wicomico, Worcester
- Column B – Region 2: Central MD Counties– Anne Arundel, Baltimore / Baltimore City, Calvert, Charles, Harford, Howard, Montgomery, Prince George's, St. Mary's
- Column C – Region 3: Western MD Counties– Alleghany, Carroll, Frederick, Garrett, Washington

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BID FORM, page 2 of 2**

Submitted By:

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name and Title: \_\_\_\_\_

Bidder Name: \_\_\_\_\_

Bidder Address: \_\_\_\_\_

FEIN: \_\_\_\_\_ eMM #: \_\_\_\_\_

MDE Contractor Accreditation Number: \_\_\_\_\_

Small Business Certification Number, if applicable: \_\_\_\_\_

Bidder Contact Information: Telephone: (\_\_\_\_) \_\_\_\_ – \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_ – \_\_\_\_\_

E-mail: \_\_\_\_\_

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